How to apply Agile successfully to your marketing

Premium member guide



B2B Marketing

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Contributors



Emma Bennett
External communications
IBM



Jim Bowes
CEO and co-founder
Manifesto



Mike Colombo
CMO
Cloudwords



Rishi Dave
CMO
Dun & Bradstreet



Shawn Dickerson
Director of solutions marketing
Workfront



Andrew Fitzgerald
Cloud marketing leader
IBM



Joe Staples
CMO
Workfront



Paul Taylor
Marketplace marketing manager
IBM



Danielle Howe
Reports editor
B2B Marketing

Introduction

The word Agile has started to enter common parlance in the B2B marketing space. But how many really know what it is, let alone how to do it?

While there are some B2B marketing teams ahead of the Agile curve who've been practising it for some time now (most of them from the tech sector, having borrowed it from software developers), many still haven't got a clear idea of what it is, and whether or not it's something worth exploring further.

Agile is exciting so many marketers because it's the answer that many have been looking for. It's a team-based way of working that produces results quickly and, at its best, enables teams to be more productive, creative and successful – so for many it's a no-brainer. But while much of this is true, it does have its disadvantages, and won't necessarily work for everyone.

This guide sets out to answer all the questions you might have about Agile, ranging from what it is, to why it matters, whether it's right for you and the steps you can take to adopt an Agile approach. The following pages contain thoroughly researched and reliable information about Agile, alongside contributions from Agile experts who are already out there practising it themselves.

What will you be able to do after reading this guide?

This guide should provide you with everything you need to start moving your team (or teams) towards an Agile approach, including:

- An understanding of what Agile is (and isn't), its history and its most common frameworks.
- The pros and cons of moving to Agile, and guidance to help you decide whether it's right for your team.
- A clear and practical guide outlining the steps to take if you want to move to Agile.
- A glossary of all the key Agile terms.
- Expert commentary and in-depth case studies from B2B marketing teams that have already successfully made the transition to Agile.

By the end you'll possess all the information you need to start taking an Agile approach in your marketing, or at the very least start implementing some of the key elements of Agile, depending on what works best for your organisation.

What is Agile marketing?

So, first things first – we need to explain what Agile is. The most useful way to start is probably to explain what it's not:

- It's not a new marketing technique or tactic
- It's not just another word for efficiency, moving more quickly or being more flexible.

Put simply, it's a different way of working for marketers.

"Agile marketing is actually a work management methodology. It's a way of doing your work that's characterised by gathering all your requests in one place (known as a backlog), breaking up your work into smaller, consumable chunks, and having a visual representation of that work – an easy way to see what everyone is working on and what the team's progress is."

Shawn Dickerson, director of solutions marketing at Workfront

"Agile focuses on working collaboratively and responding to change, rather than sticking to linear plans, meaning different individuals make their contributions in turn. So, in an Agile team you might, for example, all work together to conceive, write, design, publish and measure the success of a campaign, rather than having a writer who is waiting for a brief, a designer who is waiting for copy and an editor who is waiting for designs."

Jim Bowes, CEO and co-founder of Manifesto

What's the alternative?

The most common alternative – and what the majority of marketers (and other professionals) already follow – is the waterfall methodology, which sees projects (or in the case of marketing, campaigns) completed in separate stages, from planning to design and then final completion (this is not to be confused with the SiriusDecisions Demand Waterfall). The problem with this approach is that it leaves little room for manoeuvre, and it can leave marketing teams feeling pulled left, right and centre by demands across the business – demands in terms of both time and priorities.

Why now?

There are a number of reasons why Agile marketing is gradually becoming more popular. The fast pace of change in the industry and the fact marketing is more data led than ever means that marketers are having to respond to change more frequently – Agile lends itself to this particularly well as it's designed to be a 'test and learn' approach. Campaigns with strong digital or social media elements have to be adaptable by their very nature, which is why Agile is often an attractive way of working.

"I think a lot of marketing teams are running up against some limitations. When I first came to the industry 15 years ago, we had about five channels. Now we have literally hundreds of channels that need to be stocked with all this content, and marketers are realising they have a nearly unmanageable workload. And they can't keep up with all the change. There's a new platform to engage your audience literally every quarter. So the way we used to do things isn't sufficient for the way we work today."

Shawn Dickerson, Workfront

What's Scrum?

If you've heard of Agile, you've probably also heard of Scrum. It's effectively one way of doing Agile – an Agile framework – and it's also the most common way of practising Agile marketing (the second most popular probably being Kanban), and therefore where we'll focus most of our attention throughout this guide.

Some of its key elements, which we'll revisit in more detail later, include working in 'Sprints', daily stand-up meetings, and using boards to visualise your workflow. Have a read of our glossary on page 35 for clear and concise definitions of some of the other key elements of Agile.

A brief history of Agile

Where does it come from?

As a project management methodology, Agile has been around for at least 25 years now, having been first introduced by the software development community. It began to be adopted by marketers in the last few years, as they realised the benefits it can bring to their teams and organisations.

What is the Agile Manifesto?

The Agile Manifesto was written in 2001 by 17 developers, who put in writing the key principles of Agile software development. While these weren't written with marketing in mind, they're worth being aware of in order to understand the underlying principles of Agile.

The original Agile Manifesto:

We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

Individuals and interactions *over processes and tools*
Working software *over comprehensive documentation*
Customer collaboration *over contract negotiation*
Responding to change *over following a plan.*

That is, while there is value in the items on the right, we value the items on the left more.

The Agile marketing Manifesto:

Jim Ewel, founder of Agilemarketing.net and a big proponent of Agile marketing, has rewritten a marketing focused version of the original Agile Manifesto:

Agile marketing is an approach to marketing that takes its inspiration from Agile development and that values:

Responding to change *over following a plan*
Rapid iterations *over big-bang campaigns*
Testing and data *over opinions and conventions*
Many small experiments *over a few large bets*
Individuals and interactions *over 'one size fits all'*
Collaboration *over silos and hierarchy.*

The goals of Agile marketing are to improve the speed, predictability, transparency, and adaptability to change of the marketing function.

The main thing to remember is that Agile is all about experimentation and not being afraid to fail. This is absolutely key to an Agile approach; it's all about testing and learning, and sometimes this means failing. This is also the mindset you need to have before implementing Agile methodologies – it will take time to get right, and this will almost inevitably mean failure along the way.

The value of Agile marketing: Pros and cons

Agile marketing isn't for everyone, so it's worth being aware of the key pros and cons before you get started:

Pros

- If successful, work should be completed more efficiently, thereby saving on budget and resources – and delivering business results more quickly.
- It's built to test, learn and optimise, which is particularly suited to digital marketing efforts.
- It can enable you to more easily adapt to changing market conditions.
- All activity is led and managed by the team, which can lead to better collaboration and increased creativity.
- Members of Agile teams are encouraged to take on tasks outside their usual remit, allowing them to develop new skills.
- The workload should always be manageable (both for the team and its individual members), as it's the team that decides exactly how work is prioritised.

Cons

- Agile methodologies can be hard to understand and implement in an organisation where no-one is familiar with this way of working.
- Implementing Agile means asking team members to completely change the way they work, including being very transparent about the work they do, so there could be some push-back.
- If implemented badly and without proper understanding and support from the team itself, it can be counter-productive.
- To achieve success with Agile, certain rituals need to be followed, such as the daily stand-up meetings and the retrospectives, which means everyone on the team needs to be committed to the principles of Agile.

"This way of working is much better at responding to changing conditions in the marketplace, and has become a necessity for many organisations in an increasingly digital and social media-driven marketplace. It reduces the amount of up-front planning that has to be done – and because Agile teams are self organising, they can work faster and release campaigns much more quickly than traditional workflows."

Jim Bowes, Manifesto

Is it right for my team?

Your Agile marketing checklist

If all of the above sounds appealing so far, then Agile could be right for your team. However there are some things to bear in mind before you move on with implementing an Agile approach.

Agile usually works best when a team works on the same project(s) together, and dedicates 100% of its time to Agile. This may not be completely realistic depending on the nature of your business, however it's something to strive for. It's also possible to implement some Agile methodologies without going the whole way, as we'll see later in this guide.

Your Agile marketing checklist

Can you say the following about **your company culture**?

- It's open to an experimental approach and is happy for marketing to try new ways of working in order to produce better results.
- It's open to trial and error.
- Successes are often (if not sometimes) scaled.
- It's open to change.
- It has open internal communications channels.

Can you say the following about **your marketing approach**?

- A considerable proportion of our marketing is focused on digital.
- We're customer centric, rather than product centric.

Can you say the following about **your team**, or a team within the marketing department? (If not, can you assemble a team that ticks these boxes?)

- The team contains a good mix of skills and backgrounds.
- Everyone on the team is open to trying new things, and not afraid of failure.
- Everyone on the team is open to being transparent about the work they're doing.
- Everyone on the team is available for daily team meetings (ideally in the same location, although this is not crucial).

If you can say 'yes' to all of these, you'll probably be in a good position to give Agile a try. If not, it's still possible to try out elements of Agile (such as visualising your workflow or having daily stand-up meetings), but you'll probably find it difficult to go fully Agile. The best advice, regardless of how ready your team and organisation are, is to start small and then scale following success. This will be the most palatable option for a potentially resistant executive board, and it'll mean that any failure is unlikely to have a huge impact on the organisation.

"If a B2B marketing team finds that it frequently misses deadlines, has trouble capitalising on industry events and news stories, often experiences delays because one person in their workflow (such as the copywriter or designer) is overloaded, or spends extended periods planning campaigns, then Agile methods will be able to help with these. Some of the better known Agile methodologies such as Scrum may not be well suited to some types of marketing activity, however alternatives such as Kanban fit in well with unpredictable areas of work such as PR or social media."

Jim Bowes, Manifesto

Do I need training or consultancy to implement Agile?

Formally training yourself or your team members or hiring an Agile coach is not essential, especially if you want to implement smaller elements of Agile. However, proper training or consultancy might be worth considering if you want to speed up the process. In addition to this guide, there are lots of other resources out there that can help you along the way, so do read as much as possible before you get started (see our further reading list).

Q&A: Rishi Dave, CMO, Dun & Bradstreet

How do you define Agile marketing?

RD: I see Agile marketing in two ways: the first is a culture of experimentation. By that, I mean creating a marketing culture where people feel comfortable doing small experiments, achieving success – and failing – and then scaling this, as well as communicating those successes to get buy-in across the company. There's a culture component to that. A company, especially a large one, should feel comfortable with it.

The second part of Agile is how you execute – and that's all about trying things on a small scale, demonstrating success and then scaling.

What did you want to achieve through Agile when you joined Dun & Bradstreet?

Prior to me joining three years ago alongside the new CEO and management team, the company wasn't growing. Our primary goal was to grow the company, and to do that through modernisation across the board. I saw the incredible opportunity to leverage Agile methodology to help grow the company again.

Why did you think it would work?

The company definitely needed to modernise by leveraging more digital channels. As well as that, we just wanted to grow quickly, and Agile is a great methodology to move and drive growth. That's why we felt (and I felt specifically for marketing) that Agile would be a great way to do this and change the culture of the organisation.

What approach did you take?

I looked at Agile in three ways. First and foremost, culture. What I found with the management team was that we wouldn't get the return on Agile execution if we didn't have the culture to support it. So we focused on creating a culture of experimentation and have people feeling comfortable with trying new things, experimenting and failing. Initially I focused a lot on talking to customers and employees and being very focused on our purpose and our values.

Secondly, I became very focused on our go-to-market strategy, where we shifted from being product focused to persona focused. Then, once we had a clear idea of what we did, what our values were and who we were targeting, their painpoints and how we can address them, we really started implementing Agile. We decided to start small with 10 customers, and leverage the new content, messaging and approach with this small set of accounts (based on our analytics). Then we looked to demonstrate success, communicate that success across the company and scale to the next set of customers.

What does starting small really mean?

We actually started with one persona. We then did the same with the accounts within that persona – we went with a small number of accounts first, based on what our analytics were telling us. For example, our initial set of customers told us they wanted to learn more about how they could leverage data for digital marketing (which is the space that we're in). So we initially ran custom, one-day workshops, where we tailored the content, and we learned a lot. It's not very scalable, but as we learned we went to the next step, which was regional workshops for a larger group, followed by webinars at a large scale. That's an

example of how you start small in a custom, non-scalable way, and then as you learn you start to scale out the messaging and the content over time to a larger set of accounts.

What did your Agile teams looks like?

Once we'd established the personas we wanted to target, we actually built tiger teams* around these personas. I've found that marketers are becoming increasingly specialised in disciplines; they stay within those silos (eg. data or content), and don't necessarily naturally work across different areas. However, you need to run Agile experiments on an end-to-end basis across all these functions. A campaign consists of many elements, ranging from data to technology and content – and you can run Agile experiments in all these areas. These small tiger teams were responsible for coming up with the experiments, running them and then scaling them.

What about getting the rest of the organisation on board?

There were definitely sceptics within executive-level management. What was important was how much we invested in internal communications. So, for example, when we saw success with particular personas we invested a lot in communicating that success across the company so that people understood what worked and what didn't. There's nothing better than communicating your success to get buy-in across the board.

What advice do you have for teams looking to implement an Agile approach?

Be open to starting small at first, and don't worry about scale. Then it's about showing success, and then scaling – that's the most important thing. You also have to be open-minded about not succeeding. Failure is okay, and can be celebrated at times, because that shows you're taking risks.

**A tiger team is a team of specialists or experts in a particular field brought together to work on specific projects or tasks – they are not specific to Agile.*

How to implement an Agile approach

Because every marketing team is different, the same Agile approach won't necessarily work for everyone. In this section, we'll run through some of the key elements of Agile – the Scrum framework in particular – and how you can adopt them; how much (or how little) you try is up to you. Some of the following aspects are more fundamental to Agile, and taken together should form a solid approach, but they should not be considered the be all and end all – transforming into a 100% Agile team will require learning, training and development over time.

"I think it's fair to say that it's not a light switch that you turn on or off – people are picking the best parts of Agile, the things that make the most sense for them, and implementing those, while still retaining various concepts of a waterfall methodology."

Joe Staples, CMO, Workfront

1. Assemble a team
2. Manage your workload/work requests
3. Plan your workflow
4. Visualise your workflow
5. Carry out daily stand-ups
6. Hold retrospectives
7. Formulate Epics and User Stories

1 Assemble a team

"The first step in moving towards Agile is to assemble a team. Among the team members you'll need to have all the different abilities necessary to plan and execute campaigns. Then give them a framework."

Jim Bowes, Manifesto

How big?

The optimum size for an Agile team is about six to 10 people. Smaller is possible, but bigger can become unmanageable, and is probably unnecessary.

Who's who?

There are three elements to an Agile team – the team itself, the Scrum Master and the Product Owner. We'll run through the attributes of the Scrum Master and Product Owner next, but first let's talk about the most important element – the team.

The team

As we've seen, the perfect size for an Agile team is six to 10 members. The most successful teams will contain members from a range of different backgrounds and skillsets – think about all the elements you need to put together a campaign and ensure there are the skills in the team to make it happen. Bear in mind, however, that a key part of being a member of an Agile team is volunteering to take on tasks that might not sit within your usual remit – which is also one of the benefits as it allows members of the team to develop new skills.

Every member of an Agile team needs to:

- Be proactive.
- Be prepared to be open and transparent about their work.
- Be ready to take on tasks that wouldn't be their usual remit.
- Understand that their job title is unlikely to be relevant.
- Be committed to the success of the team and its output.

The Scrum Master

Most Agile teams are led by a Scrum Master, who's responsible for managing the day-to-day running of the team – but remember, Agile teams are self-organising, so the Scrum Master shouldn't be telling everyone what to do. Instead they should be a leader and facilitator.

The Scrum Master's job is to:

- Track and remove obstacles the team are coming up against – this can mean negotiating with senior management and other departments.
- Ensure the 'rituals' of Agile are adhered to.
- Organise and run Sprint planning sessions, reviews and retrospectives.
- Track the overall progress of the team throughout Sprints.
- Make sure the team has everything it needs to get the job done.
- Keep an eye on the velocity of work carried out by the team, so that the right amount of work is planned into each Sprint (this is worked out over time and should become more accurate as time goes on).

Good Scrum Masters have the following traits:

- Good communication and negotiation skills
- Excellent organisational skills
- Effective leadership
- Are well respected within the organisation.

In the development world the Scrum Master role is often a full-time job, however in marketing it's frequently undertaken alongside someone's day job.

If there's someone within your team who is already familiar with Agile, it makes sense for him or her to be the Scrum Master as they'll have a better understanding of the whole process. Bear in mind, though, they also need the personality traits outlined above; their primary focus has to be enabling the team to get things done.

The Product Owner

The other key role within an Agile Scrum team is the Product Owner. This person has broader oversight of the team and the projects it's working on, and often holds a senior position within the organisation.

The Product Owner's job is to:

- Set the agenda for the team by maintaining the product backlog, and ensure everything is prioritised correctly.
- Represent the business and ensure the customer (or user) is at the centre of everything the team does.
- Set objectives and KPIs, and report back to the board.

Good Product Owners have the following traits:

- An in-depth understanding of customers, the marketplace, the competition and future trends.
- Empowered to make decisions.
- Able to balance the short and long-term vision of delivery.

Name your team: Think about what you'd like your team to be called – IBM's Agile Bluemix team called itself 'The Mixologists'. A good name will increase the sense of team cohesion and add a little fun to the process.

"You have a very flat structure in Agile – Product Owners, Scrum Masters, team members are all the same... you're all equal. No one can say to anyone 'you're going to do that' – people need to volunteer."

Paul Taylor, digital marketing manager and certified Scrum Master, IBM

2

Manage your workload/work requests

"Get your arms around your work requests. *Right now, for most marketing teams, work requests come through any number of channels. These include email, voicemail, hallway conversations or an instant message. Whether it's a system with a sophisticated request process or just a shared email address, get all of your work requests in one place. This will allow you to prioritise everything you have to do. If there are projects that the rest of the team doesn't have visibility over, that's going to throw you off."*

Shawn Dickerson, Workfront

Shawn nicely sums up your job here – the effective management of the team's workload is fundamental to Agile, and also one of the major benefits, if handled properly.

This is why the backlog (to do list) is so important – any work the team does needs to come from the backlog, and any new work requests should be added to the backlog (unless you judge they're small enough to be handled straight away).

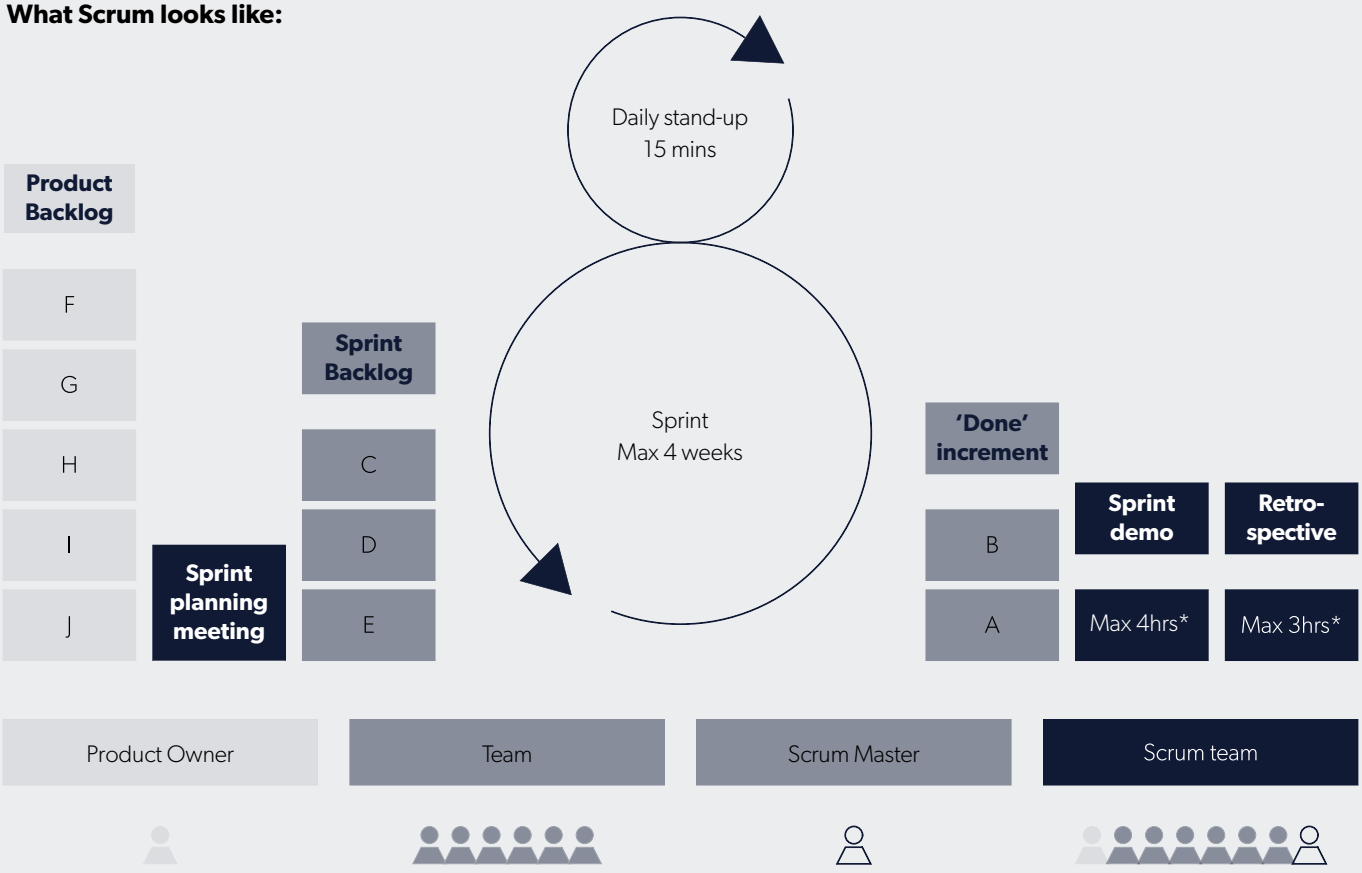
If you want to follow the Scrum framework and work in Sprints of one to four weeks, the Sprint planning meetings will be critical to your success (as we'll see next) as these will determine when tasks pass from the backlog to the Sprint. The backlog should be prioritised correctly so the next task to pass from the backlog to the Sprint is the next most important task on the list (although it's possible to re-prioritise the backlog as much as you like if tasks shift in order of importance).

As we'll see later, the tasks in your backlog will make up what are termed 'Epics' in Agile marketing – basically, your long-term goals (or campaigns).

3

Plan your workflow

What Scrum looks like:



*Duration of this event depends on the duration of the Sprint

The preceding diagram shows what the Scrum methodology looks like, including the activities in the Product Backlog (which is managed by the Product Owner), what should end up in the Sprint Backlog after the Sprint planning meeting, the Sprint itself (involving the Team and the Scum Master), and the final product (or next 'increment' of the product/activity), followed by a potential Sprint demo and then Retrospective. After the Retrospective, a new Sprint planning meeting takes place and the next Sprint starts.

If you decide to follow Scrum, the long-term goal will be to divide chunks of work up into two to three-week chunks. The length you go for will depend entirely on what makes sense for the team, but the beauty of Agile is that you can experiment, so if a two-week Sprint feels too short you can make it longer next time, and if a four-week Sprint feels too long, you can shorten it down.

So, if you're looking to produce key elements of a campaign, for example a video, your aim might be to have all the filming for the video done after one Sprint, and all the editing completed after the next Sprint. The key to Scrum is to divide the work into manageable chunks, but to always finish a Sprint with something to show for it.

Your first Sprint planning meeting might take a few hours – but at the end of it you should come out with a clear idea of what you want to achieve, and what you think future Sprints are likely to look like. It will probably create quite a lot of fundamental debate around how you work as a team. It will also raise issues around your bigger goals over the course of the next few months and year (which is where the Product Owner comes in), but moving towards Agile is all about relishing the opportunity to rethink the way you work, so remember to approach it with an open mind.

The purpose of subsequent Sprint planning meetings (which should usually take up to an hour) is for the team to decide which tasks will move from the product backlog into the following Sprint. After a few Sprints you'll get the hang of what's realistic and what isn't.

"Create a Sprint cadence. That's anything from one week to four weeks, where you break up the work into what you can accomplish over that period of time. It starts with a simple Sprint planning meeting. Let's say you choose every two weeks. Usually you're wildly off with the first few Sprints – that was the case for us. We really didn't know what we could accomplish in two weeks. But after you've done it a few times, you get a real handle on what a predictable workload is for that particular Sprint period."

Shawn Dickerson, Workfront

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Visualise your workflow

The next step, in addition to managing your workflow, is visualising it. This can also be a good tactic to use if you don't want to to go 'fully' Agile – even working with the traditional waterfall project management methodology, for example.

This is fundamental to both the Scrum and Kanban frameworks. The reasons and benefits for doing so are clear – it helps to keep communication open across the team, it ensures work remains measurable and understandable and it keeps everything in a central place that everyone can see and use.

Scrum boards or Kanban boards (both very similar) are the most common ways for teams to visualise their workflow, and a basic one looks something like this:

To do	In progress	To review	Done
Activity #1			Task A, Task B, Task C
Activity #2	Task A	Task C	Task B
Activity #3	Task B, Task D		Task A, Task C

Digital or physical?

Whether you decide to visualise your workflow in physical form – with post-it notes on a wall, for example – or via a digital tool (and there are an increasing number available) is completely up to you and the team. If your team isn't often in the same place, a digital template might be better, while a physical board may be preferable in other cases.

Kanban board or Scrum board?

The Kanban and Scrum frameworks visualise workflow in similar ways, however, there are some differences (and there's no reason why you couldn't experiment to see what works for you and find something in between the two).

Scrum boards: Because the Scrum framework is fundamentally focused around working in two to four-week Sprints, the visualisation of your work is also based on this period – if you look at the diagram on the previous page, the tasks in the left-hand column should represent those that need to happen during the process of the Sprint, and by the end of the Sprint they should all end up in the 'done' column on the right-hand side – the board is then wiped and ready for the next Sprint.

Kanban boards: Kanban boards, on the other hand, differ in a couple of ways. While in Scrum there is nothing that can limit the amount of work in the 'in progress' column, Kanban boards are typically limited to a certain number of tasks in this column, dependent on what the team has determined to be a manageable workload. There is no time 'limit' in Kanban in the same way there is in Scrum, so work just continues to flow on and off the board, and is not wiped every few weeks as it is in Scrum.

5

Carry out daily stand-ups

One of the key rituals of Agile and the Scrum framework is the daily stand-up meetings. These are very important in getting the team to its goal at the end of the Sprint. And yes, you are meant to stand up during a stand-up meeting; the idea is that sitting down makes the team more lazy and complacent, and stand-up meetings shouldn't last much more than 15 minutes.

The daily stand-ups are facilitated by the Scrum Master, but are not 'led' by that person – the aim should be for the team to be self-directed. During every meeting, each team member should share:

- What they achieved the day before.
- What they plan to achieve that day.
- What obstacles/blockers are in their way.

As previously highlighted, it's the Scrum Master's job to make sure any obstacles getting in the way of the team's progress are removed. But the rest of the team should also listen carefully to their fellow team members' issues and be prepared to help if they can.

"The rituals of Agile are all really important: the daily stand-ups, backlog story-writing of tasks that you're going to do, and the retrospective when you look at what's working, what's not and what you've achieved."

Paul Taylor, IBM

6

Hold retrospectives

After every Sprint you should also hold a retrospective. This is an opportunity for the team to discuss what's working, what's not working and any other issues (a team member who isn't contributing as much as they should be, for example).

"A retrospective is where you review what's happened in the previous Sprint: what you should start doing, stop doing, continue with doing – based on those learnings."

Emma Bennett, external communications, IBM

7

Formulate Epics and User Stories

"If I was to draw a parallel with terms that marketers are familiar with, an Epic as a campaign and a Story as an activity. So we may have an epic or a campaign that is going to span several sprints, and we break that up into a list of Stories. They call it stories because it has its roots in IT ('here's what the user wants')."

Shawn Dickerson, Workfront

Shawn explains pretty succinctly here what an Epic is in the context of Agile – it's basically the bigger picture. An Epic might run for a number of months, but is broken up into many Sprints over the course of that period, and those Sprints are broken up into manageable tasks.

It's up to the Product Owner to 'own' and oversee Epics, but it's down to them and the team to divide an Epic into Sprint-sized chunks (and then into manageable tasks).

What are User Stories?

In traditional Agile software development, User Stories are a tool used to capture user requirements through a project – they're simply a statement about what a user wants to do with a feature of the software, written from their perspective. They are usually written on index cards or post-its, and follow this format:

As a [role], I want to [task], so that I can [goal or benefit].

There are quite a few perspectives on User Stories and how they can best be adapted to marketing, so you might want to experiment and see what works best for you. Jim Ewel provides a helpful summary, explaining that the [role] is best approximated to personas, the [task] is what your customer wants to accomplish, and the [goal or benefit] is the answer to the 'what's in it for me' question.

Your Agile action plan

So, what next? You've come this far – and should hopefully have a good understanding of Agile by now – but what steps can you take tomorrow to make your marketing team successfully Agile?

1. **Do your research**

   Discuss the possibility of going Agile with key stakeholders, and find out who might already have experience within your team and the wider organisation, as they could help you champion the cause. Beyond reading this guide, learn as much as you can about Agile – reach out to determine whether any of your peers have been using Agile, and if so, what they've learnt along the way.

2. **Build a case**

   Build a case for moving to/trying Agile, both for senior stakeholders and the marketing team. Establish what you want to achieve, whether that's better workload management, the ability to move more quickly with the market, the possibility of improving collaboration, or stronger marketing campaigns (or all of the above). It's also worth tracking down examples of other marketing teams that have been using Agile methodologies successfully – there are an increasing number out there, in addition to the examples of Dun & Bradstreet and IBM included in this guide. This post by MarketerGizmo, for example, is a useful description of an Agile marketing team's first six weeks.

3. **Select which parts of Agile are best for you**

   If you don't want to go all the way with Agile, select the 'parts' that you want to use, such as visualising your workflow or ensuring all work requests come through one channel. If you're experiencing resistance to an Agile approach, make the switch as gradually as possible.

4. **Assemble the right team**

   Based on what you've decided you want to achieve by moving to Agile and which parts of your marketing would be best suited to Agile, decide what your team will look like, and identify the best candidates for Product Owner and Scrum Master roles. As Rishi Dave recommends, start small and grow as you become familiarised with the new way of working.

5. **Sort out your Product Backlog**

   If you're ready to embrace Scrum more fully, this is the time to establish your product backlog – essentially the team's 'to do' list. Whoever you've identified as the Product Owner should lead on this as they should have an understanding of the bigger picture and marketing's wider objectives within the business. The rest of the team should also be involved.

6. **Plan your first Sprint**

   Hold your first Sprint Planning meeting. This means selecting the tasks from the product backlog that can be moved over to the Sprint backlog, and establishing how long you think a Sprint should last based on when you think you'll have completed the task. Make sure the team agrees on a definition of 'done' for all tasks however big or small.

7. **Carry out your first Sprint**

   This is the exciting part – when you start working in a new, Agile way. The daily stand-up meetings are really important, as this is when you establish which team members are taking on which tasks, what everyone is achieving and what's getting in their way – remember, everyone on the team should be prepared to leave their job titles at the door and pitch in.

8. **Hold a Sprint retrospective**

   At the end of the Sprint, hold your first Sprint retrospective. This is a great opportunity to review everything that went well – and not so well – during your first Sprint. Remember that the first few Sprints are unlikely to go as expected and should be seen as a learning curve – you might find a predicted two-week Sprint is too short, for example, or that the daily stand-up meetings are proving difficult to establish. This is your chance to address any of those challenges and remedy them in time for the next Sprint.

9. **Share your successes**

   It will be hard for your marketing team to work in an Agile way without the support of the rest of the business – as demonstrated by IBM and the way they changed the way they worked with their legal team.

10. **Constantly re-evaluate**

    The idea of Agile is to be agile. If something isn't working, look at ways to change it – the beauty of it is that nothing is set in stone, so there's no need to stick with a particular way of working if it's not producing the right results for the team or wider organisation.

Troubleshooting:

What could go wrong and what can you do about it?

What does Agile mean for the rest of the business?

The biggest way in which an Agile marketing team is likely to affect the rest of the organisation is the way it handles work requests. For Agile to work the way it's meant to, the rest of the business (especially senior management) will need to accept that new work requests will be added to the Sprint backlog, prioritised and then seen to accordingly. For clues on what to do when this is ignored, see below.

The second way Agile may affect the business is the speed at which you require help or sign-off from other departments – to be a successful Agile team, other departments (such as legal, as mentioned by IBM) need to be on your side and help you move things quicker than they might be used to. The key to achieving this is communication – if you explain to relevant departments/stakeholders that you're trying this new way of working in advance, explain what it's likely to mean for them and invite any questions they might have, they'll be much more likely to help you further down the line.

More broadly speaking, Agile requires a cultural change, and this is true both within the marketing team that's directly affected, as well as the rest of the business. Other departments will have to get used to the idea that plans will no longer be made months in advance and adhered to, which some may find difficult to get their heads around. As we've already noted, the biggest way to address this issue is clear, consistent and constant communication with all affected parties.

What if senior management or other departments don't buy into Agile?

There are two main ways to address this issue (and there's no reason you can't do both, in fact it should be encouraged): the first is by building a strong case (as highlighted above), and the second is by starting small – if you start off with a small part of the marketing team going Agile, or with relatively minor marketing projects being carried out in an Agile way, this will be much less of a concern to doubters, as there won't be huge risk involved. Once you've got it working on a small scale, it's crucial to communicate your successes – this should convince any doubters, bring new supporters, and even advocates on board. After all, nothing speaks louder than results and numbers.

It's also very important to explain that Agile requires a change in mindset, as it really is about 'failing fast', learning from your mistakes, and moving on. Senior management and other key stakeholders need to clearly understand this – if they don't, your first few 'failures' will be perceived as a disaster rather than an opportunity to test and improve (which is what they should be).

> *"Agile requires a change in mindset, as it really is about 'failing fast', learning from your mistakes, and moving on"*

What about urgent work requests that can't be ignored?

Unfortunately, this is a possibility even if you think everyone has bought into your new approach. Technically speaking, new work requests should always be added to your product backlog, which can then be prioritised and potentially added to the next Sprint. For most work requests this is fine – in many cases, in fact, it can mean that a request is addressed sooner than it might have been

otherwise – but there may also be requests that are too pressing to wait until the next Sprint (for instance if they come from the very top).

First of all, remember that it's the product owner's job to take charge of the product backlog, and they should be able to determine which tasks need to be prioritised for the next Sprint and why. It's also the Scrum Master's job to remove obstacles the team faces, and this includes work requests that should not be getting in the way of the rest of the team's work.

If something truly urgent comes up that cannot be ignored, there are some options you can consider: first of all you can decide to end the Sprint, which means documenting completed items, and making all unfinished tasks into new items to be put back onto the backlog. This obviously means that everything the team was working on has been put on hold.

The second option is to create a new Sprint with a few select team members to handle the request, although this will be reordering, and potentially lengthening, the current Sprint.

Thirdly, if requests of this nature are constant, it could be feasible to have one member of the team who is designated to handle this work – this role could be rotated so that nobody is outside the main team for too long.

What if a team member isn't pulling their weight?

Agile does tend to expose team members; in particular how productive some members of your team might be. If somebody isn't pulling their weight, it's likely to become apparent very quickly – for instance they may not have completed the tasks they've been allocated (or be meeting the team's definition of 'done'), they may not be volunteering to take on tasks or their quality of work might be low

The 'soft' way of addressing this is by bringing it up in your retrospective meetings (after each sprint), where it's possible to discuss, as a team, how important it is that every member understands and meets the definition of 'done' with each task they're assigned. Alternatively, if somebody really isn't delivering, the best option might be to go through your workplace's warning procedures.

What if a member of the team leaves?

If a member of the team leaves for whatever reason, even if there is a notice period, this will naturally have an impact on the team's output. First of all, make sure this is taken into account in all Sprint planning meetings (remember employees that are about to leave are usually much less productive). If, on the other hand, a team member leaves without notice, you can either decide to end your current Sprint, or let it last a bit longer than planned, so the rest of the team can complete all the planned tasks. You might also need a bit of extra time between Sprints to audit the team's skills and/or re-estimate how long backlog items will take.

What if there are skills shortages on the team?

The ideal scenario for an Agile team is for every member to have the same skillset (more or less, anyway), so that every member is technically able to volunteer to take on any task. However, this isn't likely to be the case (or is particularly realistic) in most marketing teams – some marketers will have different strengths and weaknesses to others.

In addition, one of the key benefits of Agile is the opportunity for team members to learn new skills and expand their horizons – but this needs to be facilitated. So, when a team member says they can't volunteer to take on a particular task because they

don't have the right skills, either plan for them to learn from someone who does know, or organise some more formal training, so the next time a similar task comes up they will be able to volunteer to take it on. Remember to encourage everyone to step out of their comfort zone – after all, the more versatile the team, the more successful it's likely to be.

What if we overestimate what we're capable of during a Sprint?

When you start off with Agile, you're quite likely to over- or under-estimate how long tasks will take – this is normal, and is to be expected during your first few Sprints. Remember, the goal is not for team members to smash their goals, but to make sure that all tasks reach the agreed definition of 'done' within the timeframe. Think about how many team hours you really have during a Sprint, and make sure your tasks won't take longer than that.

Do we have to go Agile full time?

The simple answer to this is no, you don't, but it's best if you can. Agile teams are most successful when the whole team is committed to whatever project(s) they're running in Agile, however, it's more than likely that other commitments will crop up – in this case, just make sure that team members aren't expected to dedicate 100% of their working time to Agile projects, on top of anything else they might be working on. Agile teams should be happy, successful teams, and the whole point is to make team members' workload manageable, not worse than it was before.

What if it just doesn't work?

Moving to Agile, especially if you're completely new to it, is unlikely to be successful straight away. You will come up against various challenges as you change the way your team works, many of which we've outlined above. But it's possible that it just isn't right, whether that's because the type of work you're trying to do just isn't suited to Agile or perhaps you simply don't get the support you need from the top. As Rishi Dave explains, this is one of the biggest reasons to start small if you can; this means that if it doesn't work out it won't have a hugely significant impact on the business. Remember that there's nothing to stop you from borrowing bits from Agile (e.g. visualising your workflow) rather than fully embracing it from the start.

"Remember to encourage everyone to step out of their comfort zone"

The technology question

Do you need technology to be Agile?

Strictly speaking, you don't, but there are an increasing number of Agile tools out there. If you're starting out with Agile you certainly don't need to think about what technology you plan to use straight away – in fact this could become a problem if you're trying to learn Agile as well as a brand new tool. It's important to remember that Agile isn't about the tools or technology; it's much more important to make sure your team is signed up to its principles and ready to follow the rituals, that your organisation is open to the idea and ready to change its culture, and that everyone involved is fully bought in.

In this post, founder and chief content officer at Fox Content and Agile expert Andrea Fryrear explains a few key points to consider when you're thinking about the software/tools to help you on your Agile journey. Her key points are:

- Learning Agile is hard enough already, without trying to learn a new technology at the same time.
- Keep things as simple as possible for your first few Sprints, and if you're going to use a tool, use the simplest solution you can find.
- Agile will be more intimidating if you ask the team to adopt new software as well – wait for a while before thinking about which tools, if any, will work for your team.
- Much of the existing Agile software was designed with developers in mind, meaning that many may have features you don't need.
- New tools/software will make what should be a low risk, low cost way of working into an expensive, risky one.

What technology is out there and what does it do?

If you're keen to use a tool to help you on your Agile marketing journey, the options are ever-increasing.

Most existing tools have been designed with Agile software development teams in mind, and aren't specifically for marketing, but this doesn't necessarily mean you can't use them (although, as Andrea advises, keep it simple, at least to begin with).

Most Agile technology solutions allow you to manage your backlog, visualise your workflow and allocate tasks to team members (a digital version of Scrum or Kanban boards, see p.22), create and track goals and objectives, and communicate with the team. While all of this can be done quite easily with post-its, the clear advantage of a digital solution is that it can be accessed by the team remotely at any time. Finally, you might find that other tools such as Slack help your team to be more agile too – in fact some Agile tools already provide integration with Slack and other similar apps.

What about my martech stack?

Any Agile project management technology discussed above will not be connected to your existing martech stack, as it will only be used for internal purposes. Having said this, being an effective Agile marketing team means using martech effectively, as explained by Mike Colombo, the CMO of Cloudwords:

"You need the right tools and connected technologies to enable you to react quickly. B2B marketing organisations need the ability to access information quickly enough to make decisions and change direction. The elements required for agility require consuming information and reacting very quickly, which means you need data and you need it fast."

Agile tools and software

Acunote	KanbanFlow	Sprintly
Agile Bench	Kantree	Swift
Agilo	Leankit	Targetprocess
Agiloft	Markodojo	Teamwork
Atlassian	Orange Scrum	Trello
Axosoft	PivotalTracker	VersionOne
Blossom	Rally	Scrumwise
Kanban	Retrium	Yodiz
Kanbanchi	Scrum Do	ZenHub
Kanbanery	Scrummy	
Kanbanize	SmartQ	

Case study: The Mixologists

(The IBM Agile marketing team)

IBM's Bluemix marketing team implemented Agile and got it right, with campaign results exceeding expectations. Andrew Fitzgerald, Paul Taylor and Emma Bennett explain how Agile and the principles of design thinking have transformed their marketing and led to a happier, more productive and more creative team.

The right foundations

Having the right foundations in place is fundamental to successful Agile marketing, and Andrew explains why Agile wasn't such a foreign concept for tech giant IBM: "Agile as a 'philosophy' has been gaining quite a bit of ground within IBM generally. Obviously we have lots of developers who have been using Agile for a very long time, so there's lots of talk across the organisation about Agile and how we can incorporate some of its principles. So I and our CMO at the time (Alison Orsi) decided we wanted to try something, and we wanted to see whether it would work for us."

The team was in a good position to get started with an Agile approach – IBM has its own marketing innovation group that's designed to get marketing teams at IBM trying new things. In addition to this, Paul already had experience with Agile, which meant the team could really hit the ground running.

"Having the right mindset was also crucial to the team's success – there was no fear of failing, and the team was given the freedom to get it wrong"

Having the right mindset was also crucial to the team's success – there was no fear of failing, and the team was given the freedom to get it wrong. As Emma explains: "Because Andy was behind it and Alison was our sponsor at CMO level, it meant we weren't afraid of failing. The idea was to 'fail fast, move on, learn from your mistakes'. Often you wouldn't have that attitude if you're doing a big marketing project." Paul describes it as "learning quickly" rather than "failing fast".

High expectations

Although the team went into the process with a positive attitude, expectations were high and objectives were ambitious. As well as shifting perceptions of IBM and Bluemix among enterprise developers, Andrew explains the high target he set the team: "Everything we do from a marketing perspective is ultimately about driving demand. We set some very specific objectives – Bluemix was a relatively new product, and a key step for us is to get people to register for free trials. The objective we set ourselves was to increase the number of free trials that we drive through marketing by three times – and to do that in three months."

Getting going

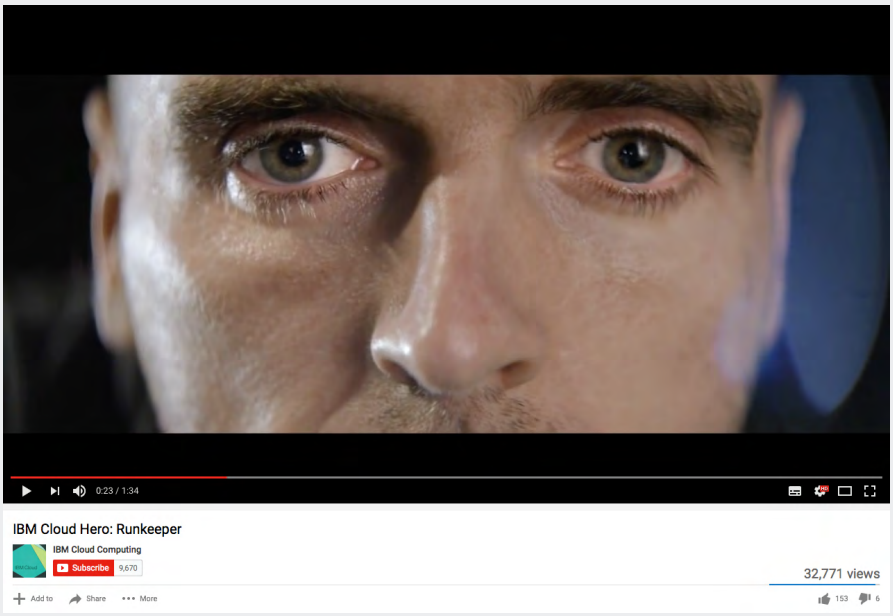
To start with, the team undertook a three-day workshop in October 2015 on Agile methods and design thinking. It also built the initial project/campaign backlog, mapped the customer journey and made sure the right foundations were in place. Paul explains: "We did a three-day, deep-dive training session before we even started, and at the end of that we had journey mapping and empathy mapping of the customer journey."

Wide-ranging campaigns

Over the course of the year the team ran a variety of activities to reach its audience of enterprise developers and developer executives. The project was originally envisaged as a digital and social campaign but quickly grew to encompass a variety of other activities, which was made easier thanks to Agile.

Video content was developed and deployed via paid media, search and social. A PR push generated extensive coverage for key stories – The Blind Runner and Mind Controlled Star Wars BB-8 droid. Events included a 'Mad Scientist' event in partnership with the London Java Community – a key influencer.

Speaking about the team's partnership with blind runner Simon Wheatcroft, Andrew explains: "[The campaign] initially started somewhere else in our organisation, but the task for us was to take the original video and get that out to market in the UK, and it grew from there. In Agile, it was about chunking that story down to the individual tasks that you need to move it along." These include the creation of the advert on the right,



"In Agile, it was about chunking that story down to the individual tasks that you need to move it along"

which ran on a variety of media, and another story focused on the development of a new app for Simon, allowing him to run an ultramarathon across the Namibian desert in May 2016.

The daily rituals

The team emphasises how following the rituals of Agile marketing helped them to succeed, at least to begin with – a half-hearted approach wouldn't have worked. Paul says: "The rituals of Agile are all really important. The daily stand-ups, backlog story writing of the tasks that you're going to do, the retrospective when you look at what's working and what's not and what you've achieved… you've got to stick to those rituals – I know other teams struggle when they don't stick to rituals."

Highlighting the specifics of one example – the daily stand-up meetings, Paul says: "We have a daily stand-up at the start of every day. Basically you go around the table – one person speaks at a time – and you each go through what you've you finished, what you're working on and whether you have any blockers. That takes 15 minutes. Strictly you should only pick one task, work on it, and then move on to the next one. That's fine in software development, but we've often got two or three tasks each."

"The rituals of Agile are all really important. The daily stand-ups, backlog story writing, the retrospectives… you've got to stick to those rituals"

The ripple effect

The effect of this one team working in an Agile way also had a positive impact across the rest of the organisation. Andrew explains that "…it has to, because if you're a marketing team you don't sit in isolation (or at least you shouldn't do)". He mentions that when The Mixologists had to work with the legal team, they warned them in advance that they were operating in this new, Agile way and that they needed things to move more quickly.

Emma adds: "It was great, because we actually saw [the legal team] getting into the spirit as well and realising they needed to move more quickly, and they did. And we've had a couple of campaigns where we've needed legal sign-off quickly (within 24 hours) and it was done – and for us, getting them to think in a much more Agile way was quite a milestone."

The results

The original target was to increase the number of free trial sign-ups threefold within three months. In this time the goal was both hit and exceeded – free trial sign-ups in fact grew by almost four times the original number in three months.

Emma also highlights how Agile marketing increased productivity and creativity within the team: "[Agile] has fostered things that have come out of this project that we'd never done before, or tried before in IBM. Actually, a lot of the things we've done have been more consumer-focused, and human interest stories rather than your traditional B2B. I think that's the great thing that's come out of it."

What next?

Following the team's success, targets have progressed too: "We've evolved targets as well, so it's become about more than online registrations, how we convert those registrations into paid-for users and how we drive bigger enterprise opportunities," says Andrew.

Why it worked

A number of elements came together for The Mixologists that made Agile work particularly well. They included:

- The product was not particularly well known, so it was perfect for experimentation and the team almost had nothing to lose.
- One member of the team (Paul) was already familiar with Agile, which made it easier for everyone else to adopt this new mindset.
- The team had regular opportunities to sit down together in the same room and thrash out ideas – two employees from Bucharest joined the team and were able to regularly participate via Skype.
- A positive attitude and endorsement from the top, coupled with no fear of failing.
- The team stuck to the rituals of Agile, ranging from daily stand-ups to retrospectives.
- The team embraced the spirit of Agile, and it was also embraced by other parts of the organisation – there are now key internal advocates across the company who help the team with any ongoing projects.
- The target audience was at the heart of everything the team did.
- The team itself included a set of people with a diverse mix of skills and abilities, all of whom were prepared to leave their job title at the door and get stuck in with any task.
- The team worked with an Agile coach to ensure they had the right expertise and knowledge to help them succeed.
- There was a clear definition and understanding of when a task was actually completed.
- The team is completely self-directed.
- There is an understanding that when unexpected work comes in something else has to give.

Agile glossary

Here are definitions of some of the key terms you'll come across in Agile – they're all terms used in Agile software development, however some have been adapted to work for marketing teams:

Scrum: Agile project management (in the software development world) can be carried out in a number of different ways. Scrum is one such framework, and generally the most commonly adopted in marketing.

Kanban: This is another Agile framework – Scrumban is a mix of the above-mentioned Scrum and Kanban.

Product Owner: The nominated person within the organisation who oversees an Agile team, but isn't necessarily involved in the team's day-to-day activities. This person has a more strategic role and often coordinates with senior management, for example.

Scrum Master: The nominated person within an Agile team who leads Sprint planning meetings, stand-up meetings and retrospectives. It's possible to become a certified Scrum Master (another way of learning the role).

Sprint: These are blocks of two to four weeks of work. Each sprint starts with a Sprint planning meeting, when the team decides the goals for the Sprint ahead. It's bookended with a retrospective, when the team discusses what went well, what didn't, and learnings for future sprints.

Sprint demo: This is a time-boxed meeting (around one hour) during which the team plays back what it's achieved and demos any working functionality or prototype.

Backlog: This is essentially your to do list. In Scrum you would usually have a Product Backlog and a Sprint Backlog – the former being your longer-term to do list, the latter being the list of tasks you want to achieve in your next sprint. The purpose of Sprint planning meetings is to prioritise and decide what goes from the product backlog to the Sprint Backlog.

Stand-up meetings: These are daily meetings between an Agile team, discussing what each team member achieved the day before, their tasks for the day ahead and any blockers. This is facilitated by the Scrum Master.

Retrospective: This is a meeting at the end of each Sprint to discuss what went well, what could have been better, and things to remember for future sprints. This meeting is usually facilitated by the Scrum Master.

Kanban board: This is a visualisation of a team's workflow, most often indicating work in the Backlog, work in progress, what's waiting for approval and what's done.

User Story: This is a tool which allows marketers to better understand their target audience (and personas) and their viewpoint. Often written on a large index card, they follow the format: "As a [role], I want to [task], so that I can [goal or benefit]."

Epic: This is a set of User Stories over the course of a few weeks or months – in other words a campaign.



Danielle Howe
Reports editor
B2B Marketing

Conclusion

So, as you can see, there's a lot to Agile. If you've read through this guide, you probably feel somewhat intimidated – just as I did a few months ago when I first heard the term. But it really is something to get excited about; Agile, if embraced and embedded in the right way, can unlock the full potential of marketing within your organisation, and that's a hugely exciting prospect.

So here are the key things that I believe you and your organisation need to remember before you get started:

1. Look beyond the jargon. Yes, words like 'Scrum', 'Sprint' and 'Kanban' are irritating, but they're really just a means to an end. Don't let them put you off: the concepts aren't anywhere near as mystifying as the terms themselves.

2. View Agile as a new adventure. The first few weeks (and perhaps months) are unlikely to be plain sailing, but they'll also be where all the good stuff happens; you'll start to discover what your team is really capable of and how much more quickly you're able to achieve big results.

3. Keep an open mind and be flexible. Flexibility is, of course, a cornerstone of Agile; being too attached to your forward-planning schedule won't do you or your team any favours.

4. Prepare to lead, rather than follow. There aren't many organisations practising Agile marketing at the moment (although the number is growing). This doesn't mean you should wait before getting started; what it means is that those that act now are likely to learn important lessons way ahead of the competition.

So what does the future of Agile marketing look like? In short – bright. When you look at the success of brands such as IBM and Dun & Bradstreet, it's only a matter of time before other B2B teams catch on. As a result, the next few years will undoubtedly see more a 'formal' adoption of Agile marketing as the software development methodology continues to be moulded and reconfigured to fit the changing needs of the modern-day marketing department.

It's up to brave, ambitious and optimistic B2B marketing teams to lead the charge and show that they can be – and are – not just agile, but creative, sharp, inspiring and unrelentingly forward-thinking.

Further reading

Books:

Scott Brinker, *Hacking Marketing: Agile Practices to Make Marketing Smarter, Faster, and More Innovative*, April 2016, John Wiley & Sons

Greg Cohen, *Agile Excellence for Product Managers: A Guide to Creating Winning Products with Agile Development Teams*, February 2010, Super Star Press

Jeff Julian, *Agile Marketing: Building Endurance for Your Content Marketing Team*, January 2016, Squared Digital

Jascha Kaykas-Wolff, *Growing Up Fast: How New Agile Practices Can Move Marketing And Innovation Past The Old Business Stalemates*, August 2014, Marketing Iteration

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CMG Partners, *The Agile Advantage*

Jim Ewel, *Agilemarketing.net*

Andrea Fryrear, *How to Stop Working So Hard: Agile Marketers Work Smarter*

Suzanne Martin, *Agile: Why slow and steady doesn't win the marketing race*

Lisa Nirell, *The 6 Secrets of Agile Marketers*

Angela Sanders, *How to: Become an agile revenue marketer*

Joe Staples, *What's keeping marketers from going agile – and how can they beat it?*

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B2B Marketing

B2B Marketing
Clover House
147–149 Farringdon Road
London
EC1R 3HN

Tel: +44 (0)20 7014 4920
info@b2bmarketing.net

b2bmarketing.net